



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Human Resources Director

Job Code Title

Operations Manager I

Pay Band

8a

Job Code Number

111218

Director's Office

Office of Human Resources and Organizational Development

Fair Labor Standards Act

Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Director's Office supports the agency's Director and is composed of five work units: Legal Services Office; Office of Tax Policy and Research; Office of Human Resources and Organizational Development; Office of Taxpayer Assistance; and the Executive Office. The Office of Human Resources and Organizational Development (HR) is responsible for a variety of human resource duties including organizational and workforce development, employee and labor relations, staffing, employment law, performance management, compensation, and training.

Job Responsibilities

The Human Resources Director is responsible for management, leadership, direct supervision of management staff, and indirect supervision of subordinate staff involved in administering a variety of HR programs including organizational and workforce development, employee and labor relations, staffing, employment law, performance management, compensation, training and development. Work includes determining and formulating policies and business strategies for the management of the department's human resources and establishing the overall direction for the office including determining short, intermediate, and long-range goals and objectives associated with the management of HR programs. As the human resources subject matter expert for the department, the incumbent provides overall vision and direction to OHR programs and activities of the department and interprets state and federal laws, statutes, rules and regulations for assigned staff, other agencies and the public. The incumbent works with the executive leadership as a strategic business partner to help facilitate human resource and organizational development functions globally across the department that support and enable the department to achieve its goals and strategies. The position reports to the director.

- **Staff Leadership, Management, and Supervision 30%**

The incumbent is responsible for leading staff and delegating the management of division programs to subordinate managers appropriately. The HR director monitors the progress of work plans, goals, and objectives of the division; ensures they are in line with the department's goals and priorities; and makes adjustments as needed. Supervision and development of staff is imperative to a manager's success.

Staff Leadership

1. Creates and maintains a high performance environment characterized by enthusiastic and positive leadership, direction, and a strong team orientation. Motivates employees to accomplish numerous division goals and objectives. Coordinates performance measures with staff. Encourages the development of new techniques or solutions to problems and assists with the resolution.
2. Provides leadership and mentoring opportunities to direct and coordinate the activities of staff through subordinate managers to ensure efficient operations and increase productivity including implementing and monitoring corrective action plans to solve problems.
3. Readily adapts to changes in existing operations, programs, services, activities, and functions. Makes recommendations. Takes necessary action to implement or accommodate changes. Maintains a positive attitude in communication to staff even when difficult changes arise.
4. Maintains an atmosphere of safety within the division. Ensures adequate training for all staff in proper lifting techniques, sensible ergonomic practices, and work-specific safety opportunities.
5. Makes and accepts responsibility for decisions necessary to carry out HR's mission.
6. Accepts direction and feedback from supervisors and follows through appropriately.
7. Provides appropriate direction and feedback to subordinate supervisors. Ensures that delegated responsibilities are carried out and delegated authority is used appropriately.

Management

1. Conducts strategic planning in coordination with the director to develop and establish short and long-range plans. Participates in development of viable goals and objectives consistent with agency priorities.
2. Develops programs, policies, and procedures to assure the citizens of Montana that the department operates in accordance with the highest standard of integrity and ethics.
3. Evaluates state and national standards; new trends and technologies; division needs; and other factors to integrate requirements and resources into program plans.
4. Establishes and approves overall responsibilities, organizational structures, work activities, work plans, deadlines, and priorities. Evaluates workflow processes, efficiencies, and problems to identify the most effective use of staff and material resources to meet goals and objectives. Appropriately allocates resources to accomplish assigned work by coordinating with other work units and programs and adjusting subordinate assignments as needed. Considers pertinent factors such as available resources, staff ability, timelines, and work load. Identifies the need for additional staff or resources while maintaining fiscal responsibility.
5. Plans, schedules, and assigns special projects. Initiates adjustments to reflect changes in overall division and agency goals, operations, and relationships to departmental divisions.
6. Monitors compliance with established operational policies and procedures and achievement of division and department goals through consultation and regular meetings with subordinate supervisors; personal review of program and project management activities; and through discussions with other department staff and management. Disseminates data and promotes information exchange for support and advancement of department mission and goals. Uses input from the staff to guide program responsibilities.
7. Recommends program budgets for staff and equipment. Reviews allocations, project plans and objectives, and expenditures.
8. Identifies information needs and develops reports, information systems, spreadsheets, and other tracking methods to monitor program status, work progress, division performance, and individual performance. Uses data to identify areas of concern, strengths, and weaknesses. Provides analysis and recommends solutions to department management to resolve problems. Oversees quality control of information and sources.

9. Prepares correspondence in response to requests or inquiries. Ensures that necessary reports, correspondence, documentation, administrative actions, files, and records are correctly prepared, completed, maintained, and processed in accordance with applicable guidelines and time frames. Ensures the all areas of the division follow department expectations regarding disclosure and employee confidentiality.

Supervision

1. Recruits and hires employees. Interviews applicants and makes appropriate selection recommendations according to applicable laws, rules, policies, procedures, and guidelines. Ensures proper training and orientation of new employees.
2. Establishes criteria for acceptable work behavior and performance. Promotes workplace efficiency and productivity by educating, mentoring, coaching, and correcting employee behavior. Encourages exceptional performance and improvement in areas of individual weakness. Develops and monitors corrective actions.
3. Appropriately reviews, recommends, and initiates personnel actions according to applicable policies, procedures, and guidelines. Carefully considers options available. Works with Human Resources to take appropriate disciplinary action as needed. Enforces disciplinary policies.
4. Recognizes and promptly resolves internal and external issues. Mediates personnel issues in a very timely manner.
5. Completes employee performance reviews. Defines goals and required results at the beginning of the performance review period. Communicates on a very regular basis with staff on progress toward those goals and results.
6. Determines the training needs of staff through analysis of program effectiveness, new technology and policies, and staff performance. Ensures consistency in the application of training opportunities for all staff. Develops and enhances on-the-job training opportunities to ensure staff is provided the needed training to fulfill their job duties including cross-training opportunities. Provides necessary information and tools to staff to complete any new tasks and duties
7. Communicates policy and procedures clearly and effectively in order to obtain desired results. Ensures staff adhere to rules, policies, procedures, and collective bargaining agreements.
8. Monitors and approves staff leave usage while ensuring adequate coverage is maintained.
9. Upholds and promotes the department's conviction to customer service throughout agency contacts as well as in communication with taxpayers. Staff is held accountable for providing the highest level of customer service to all those that they come into contact with.

- **HR Administration, Planning, and Policy Development 35%**

The incumbent provides executive oversight and direction for HR activities statewide through long-range planning and the development of operational policies. The incumbent directs the development and management of the policies, administrative systems, and resources of HR to ensure adequate support for projects; effective and efficient use of staff and funding; compliance with state requirements; and continued program operations.

1. Identifies approaches to increase efficiency in delivering services. Directs long-range strategic planning. Discusses agency goals and objectives with the director. Anticipates future needs. Analyzes emerging issues that may impact HR services and operations. Determines the need for new programs based on input from other governmental agencies, the public, and other entities. Researches programs of other states. Calculates the impact of proposed programs on the state. Develops programs to implement the HR's strategic plan.
2. Assesses department needs and develops the HR's strategic plan to meets the needs of the state and the department. Formulates HR programs to meet the needs outlined in executive plans. Evaluates the effectiveness of programs and their impact on department operations. Researches areas to improve program efficiency and services.

3. Develops a comprehensive annual work plan by assessing the impact of changes in state and federal laws on HR operations; reviewing HR policy to ensure continued legal compliance; and developing innovative methods to increase efficiency and ensure excellent customer service. Presents the annual work plan through documents and meetings with HR staff and cooperating agencies.
4. Develops and implements HR policies, standards, and procedures to ensure effectiveness and consistency of program implementation statewide. Evaluates past practices. Interprets all applicable state and federal laws and policies. Addresses concerns and suggestions from HR staff and the public.
5. Evaluates the effectiveness of HR services and operations to ensure that program practices and methods comply with laws and meet customer needs. Conducts research and analysis. Assesses program policies and practices. Proposes changes to enhance services. Researches and analyzes statutes and legislative changes, state policies, and past policy decisions to ensure program methods and goals are in compliance with the federal and state laws.
6. Implements changes required by state and federal regulations and policies affecting program coordination and related department services. Develops and implements standards and procedures to ensure ongoing effectiveness and compliance of HR programs.
7. Analyzes the statutory, administrative, and programmatic objectives of HR programs to develop performance measures that ensure the overall effectiveness of programs and services. Provides administrative and policy guidance and oversight to the HR manager to ensure compliance with state statutes, administrative rules, and the department's direction.
8. Participates on the executive leadership team to identify common priorities, solve common problems, and obtain common goals. Under the director's leadership, the executive leadership team manages the department; recommends legislation to the governor and the legislature; and makes final agency decisions on matters within the department's scope.
9. Directs the use of services, funding, and staff to ensure effective use of HR resources and assesses the need for additional staff, equipment, and services on an ongoing basis.
10. Determines specific budgetary needs by analyzing requests; past expenditure experience; policy or law changes; and projected costs and requirements. Devises and recommends agency positions and actions pertaining to budget issues.
11. Monitors the HR budget projections as well as performance indicators to ensure program efficiency. Oversees the procurement, purchase, and inventory control of HR equipment and supplies to ensure adequate and contemporary equipment and technology are available within budget constraints. Approves expenditures to ensure budgets are not exceeded. Ensures compliance with state accounting and property management requirements and agency, state, and federal laws, regulations, and policies for the use of funds.
12. Works with other division administrators to ensure compliance with authorized departmental budgets. Recommends and implements fiscal operational corrections as authorized.
13. Directs ongoing monitoring of program compliance and progress to identify areas for program improvement or enhancement. Ensures requirements are met and department resources are used in the most efficient manner possible. Reviews and approves requisite planning activity reports, budget submissions, and other required documentation.
14. Conducts research and responds to specific project and information needs of staff. Interprets policies, administrative rules, and other regulations. Analyzes and resolves complex and controversial problems related to HR operations.

- **Department Human Resource Management 30%**

The incumbent provides overall direction for the department's human resource management and planning.

1. Directs and oversees department human resource functions including the development, interpretation, and implementation of department policies and procedures to ensure practices and procedures are in line with federal and state laws and regulations. As the department's

- subject matter expert provides guidance to department management on sensitive and complex personnel issues and speaks for the department on human resource issues.
2. As a member of the management team, works with upper management to determine the type, nature, and extent of human resource programs and practices best suited to support the department's mission. Works to balance the program requirements of the OHR and the needs of the department.
 3. Facilitates and provides guidance and consultation to management teams in all HR matters including human resource and organizational development implementation strategies and priorities, policy/practice interpretation, and strategic workforce planning.
 4. Assesses the effectiveness of human resource programs; analyzes emerging issues; identifies methods to increase the efficiency of delivering services; and develops an annual work plan. Researches developments related to labor relations, compensation, recruitment and retention, workforce development and planning, civil rights, occupational safety and health, performance management, and other strategic human resource areas.
 5. Develops and implements workforce development, staffing, succession planning, and professional development plans, policies, and systems. Ensures adequate staffing, expertise, and skills are available to meet current and future agency business needs and to provide employee development and advancement opportunities.
 6. Builds long-term strategic partnerships with people, organizations, and other interested or affected parties who can add value to the department's OHR administration.
 7. Analyzes statistical data and reports to identify and determine causes of human resource management issues both current and potential and develops recommendations for improvement of organization's personnel policies and practices. Maintains records and compiles statistical reports concerning personnel-related data such as hires, terminations, performance appraisals, and training.
 8. Maintains an effective and equitable system of employee evaluation and accountability to enable employees to continuously improve performance and contribute to the department's efficiency and effectiveness. Administers compensation, benefits, performance management systems, and other human resource programs to resolve complex staffing issues. Analyzes and modifies related policies to establish competitive programs and ensure compliance with legal requirements.
 9. Advises managers on organizational policy matters such as equal employment opportunity and sexual harassment and recommends needed changes.
 10. Studies legislation, arbitration decisions, and collective bargaining contracts to assess industry trends. Evaluates current statutes relative to the department's human resource programs and overall objectives; researches and evaluates alternatives; develops legislative proposals; and monitoring legislative processes. May testify before legislative committees; respond directly to legislative information requests; and provide professional expertise and advice as requested.
 11. Analyzes conflict and disciplinary situations involving a variety of employment issues, including grievances, complaints, discrimination, or misconduct. From the evidence at hand, anticipates probable outcomes, and determines solution or defense strategy consistent with laws, rules, regulations, precedent, and department goals and objectives. Represents the department at personnel-related hearings and investigations and commits the department to settlement agreements.
 12. Represents department management in labor negotiations while maintaining an established quality relationship of respect and communication with unions representing department employees during collective bargaining issues. This involves analyzing proposals; developing and presenting management's case and contract changes; and providing management's responses to contract issues and proposals. Requires comprehensive knowledge of the department's collective bargaining agreements and proper application regarding employee issues.

13. Implements and manages a competitive compensation plan, department wide operational policies and procedures, and oversees program compliance and achievement of goals.
14. Continuously improves the knowledge and skill level of the department's workforce through an effective, standardized training program.
15. Ensures that current and prospective employees are provided with accurate information about policies, job duties, working conditions, wages, opportunities for promotion, and benefits.
16. Prepares correspondence in response to requests or inquiries.
17. Develops effective outreach and recruitment practices to improve the diversity of the department's work force at all levels with respect to the population of Montana, ensuring adherence to relevant federal and state laws and regulations and department policy.
18. Provide effective and appropriate means of open communication and participation by employees in department decision-making to support employee commitment to the department's work and to respect each employee's role in the organization.

- **Other Duties as Assigned 5%**

1. Performs other duties as assigned.

Job Requirements

To perform successfully as an HR director, the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. It is essential that the incumbent has the ability to make sound decisions and be accountable for them. Strong communication skills and the ability to communicate effectively and respectfully with a wide range of audiences are required. Seasoned judgment in decision making is necessary since the work is performed with minimal guidance and within broad guidelines. The incumbent is expected to apply critical thinking skills; be a problem solver with the ability to identify and resolve tactical and strategic issues before they become problematic; resolve operational issues; elevate matters as necessary; recommend solutions; and effectively implement division changes and management directives. The position requires considerable skill in developing approaches to issues that have significant economic impacts on the state and taxpayers; program planning and implementation; negotiation, facilitation, and mediation; leadership techniques; project management; resource planning; organizational design; staffing and resource allocation; program administration; and budgeting. It is essential that the incumbent has the ability to work cross-functionally with all levels of senior management and employees and work effectively under pressure. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

The position requires extensive knowledge of state and federal human resource regulations, policies, and practices, compensation, benefits, organizational development, recruitment and selection, retention strategies, labor relations, and employment law. The position requires knowledge of business law; governmental organizational structure; government accounting and budgeting; procurement and inventory management; applicable state and federal regulations; public relations and communication; management theory and techniques; performance management; operational and program planning; organizational theory; project management; and legislative and administrative rule processes. The work requires knowledge of the direction and policies of the department; issues regarding the state and their impacts on division operations; in-depth knowledge of the methods, rules, laws, and functions of division programs; and applicable state and federal revenue laws and regulations. Knowledge of computers and database management including state and information systems (SABHRS); data collection, analysis, and reporting techniques; compliance requirements and practices; customer service standards; supervisory principles and practices; and department and state personnel policies, procedures, and precedents are also required.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is a bachelor's degree in human resources, public administration, business administration, accounting, economics, or related field and eight years of job-related work experience including three years of senior-level management experience.
 - Work experience should include professional level experience in human resource management that includes developing and implementing high-impact programs and working as a business partner with senior executives and five years working with labor unions and direct labor negotiation experience.
 - Experience in the implementation and management of a comprehensive compensation program and employee performance management is required.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

This position has considerable mental stress and pressure due to supervisory issues; workload; conflicting, multiple priorities; critical projects with hard deadlines; time constraints; significance of decisions made; the challenging nature of contacts with taxpayers, elected officials, etc.; and coordination of all human resource functions. At times, the incumbent will deal with angry, hostile, and difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. Work hours may exceed 40 hours per week from time to time. Leading up to and during legislative sessions work hours routinely exceed 40 hours per week and may include working evenings and weekends,. May involve minimal travel therefore a valid Montana driver's license is required. This position requires considerable computer and keyboard use. The incumbent may spend considerable time on the phone. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Alan Peura, Deputy Director Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resource Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____

Date: _____

Name (print): _____